ITCD

Creating an Archive Folder
Outlook 2011 for Macintosh
April 2014

Follow the steps in this document to create, manage, and backup Archive folders. Your Archive folder may contains local Outlook folders, such as Calendar, Inbox, Tasks, Sent Items, Outbox, Deleted Items, and user-created folders.

Contents

Storing Outlook Files

Store Outlook messages, contacts, appointments, tasks, notes, and journal entries in one of the following two locations:

Outlook Mailbox	Information in your mailbox is stored in your user account on the Exchange server. Most Outlook mailboxes have a limited size of 1 GB. If the mailbox size reaches 990 MB, you will receive notifications that your mailbox needs to be decreased. If the mailbox size reaches 1 GB, you will still receive e-mail messages, but you will not be able send e-mail messages. Visit the Mailbox Management page for more information: http://itcd.hq.nasa.gov/mailbox_management.html
Archive Folders	An Archive folder is created by exporting items. The Archive folder is then imported back into Outlook to move Outlook items outside of the Outlook Exchange server and outside of the **On My Computer** folders, thereby decreasing the size of your Outlook Exchange mailbox.

The Importance of Using Archive Folders

There are many benefits to working with Archive folders including speed, performance, protection, and mobility.


Faster and Better Performance

A large mailbox size can result in slow response times when opening Outlook, and sorting and/or searching files. Therefore, when you create Archive folders, as shown at right, you can move items from your Outlook mailbox (on the server) into an Archive folder, thereby reducing the size of your Outlook mailbox, which improves performance.

Backup Protection

Once you move Outlook data into an Archive folder (shown at right), as long as you are connected to the NASA network, these files are backed up regularly by Mobile Information Protection (MIP) during your scheduled backup.

Important! If the Archive folder is larger than 20 GB, it will not be backed up. See Check .olm File Size for steps. If your Archive folder is over 20 GB, split it into smaller files. See Create an Archive Folder for steps.
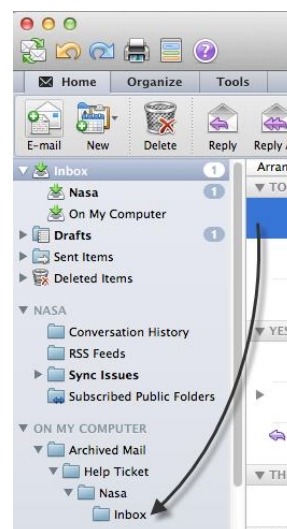
For additional protection, you can also choose to manually back up your Archive folders on a regular basis. The Export by Category section describes this process. The size of your Archive folder and the frequency with which you perform incremental backups determine the length of time it will take for the backup to complete. More frequent incremental backups reduce the length of time needed for each backup to run.

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Mobility

If you would like to import the Outlook data to another Outlook client on a different computer, or use the Outlook contacts on another e-mail client or another computer, you need to first create an Archive folder (.olm file).

Archive Folder Creation Flowchart

The following sections of this document detail each part of the Archive folder creation process, as illustrated below.

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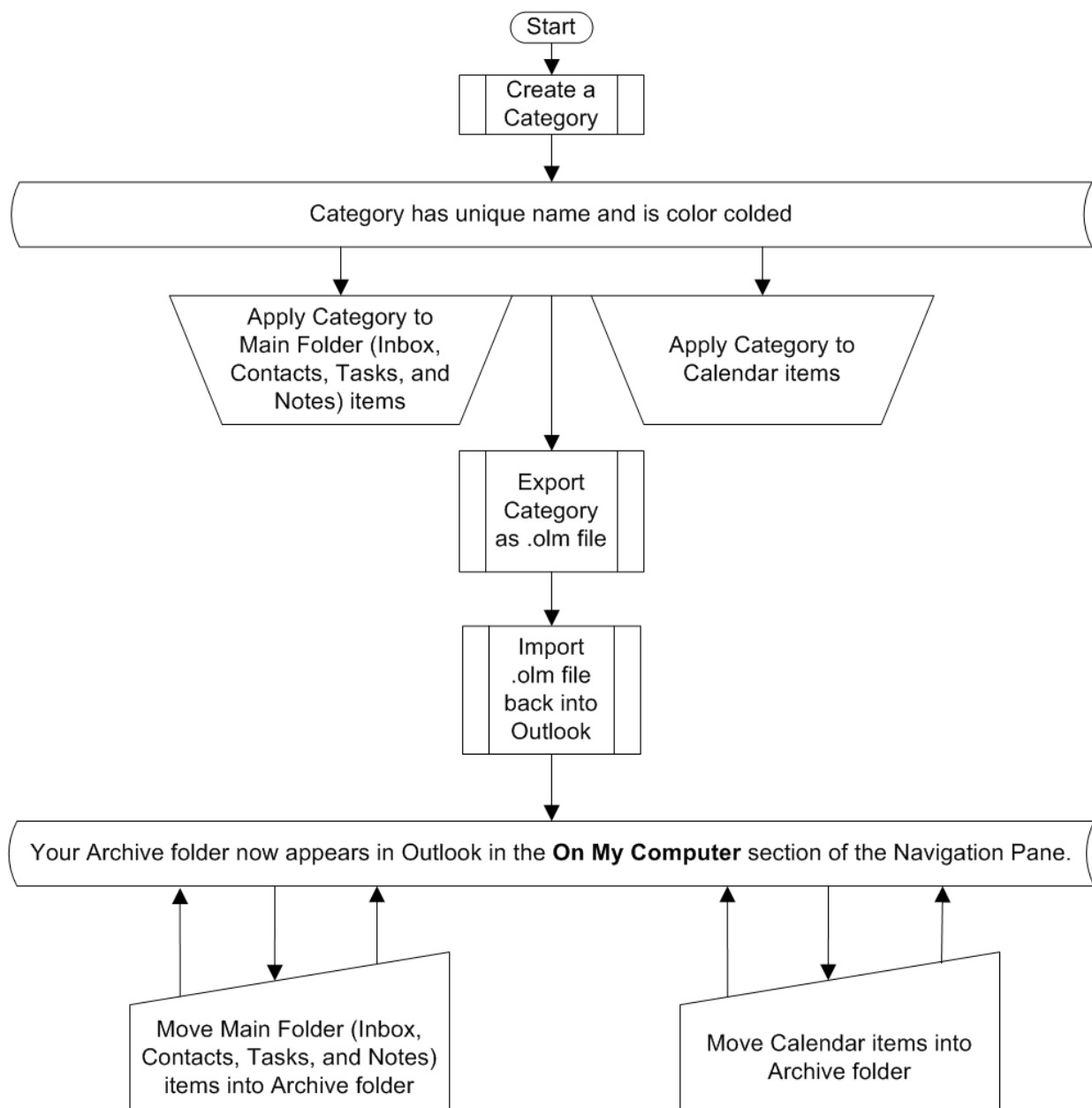
Create an Archive Folder

Using Archive folders as your filing system moves the Outlook items off the Outlook Exchange server thereby decreasing the size of your Outlook Exchange mailbox.

- Very large Archive folders can become corrupt. Using multiple Archive folders for unique projects or by year is recommended.
- Archive folders are not accessible through Webmail (OWA)

Create a Category

The first step in creating an Archive folder is to create meaningful categories for your various Outlook information (messages, contacts, appointments, tasks, notes, and journal entries). Categories identify the items to be exported, and can be used for sorting, filtering or searching.

Examples:

- You can create a Category and name it "Project A." Any e-mail message, contact information, appointment, task, note, or journal entry that is relevant to Project A can be "tagged" for inclusion in this Category and then exported.

- Alternatively, you may want to create a Category for each of your main contacts.

You can create a Category from either the Mail, Contacts, Tasks and Notes main folder view, or from the Calendar view.

Create Category from Main Folder View

To add a Category from the Mail, Contacts, Tasks and Notes main folder view:

1. Click **Home** Tab | **Categorize**.

2. Select **Add New** or **Edit Categories**.
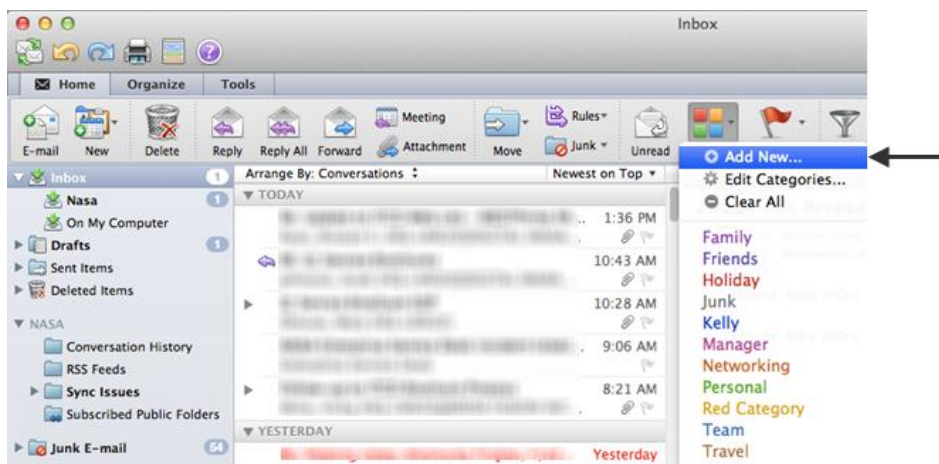
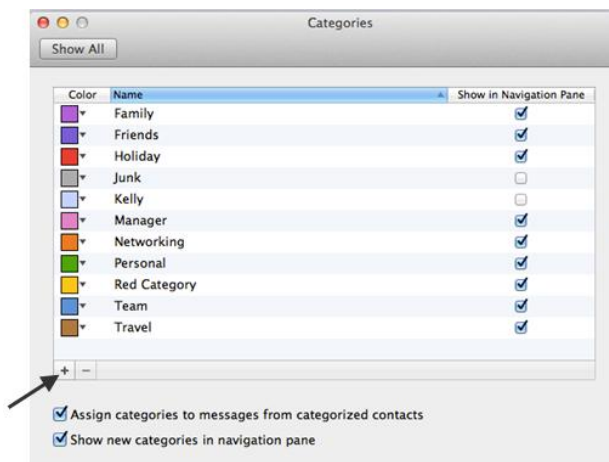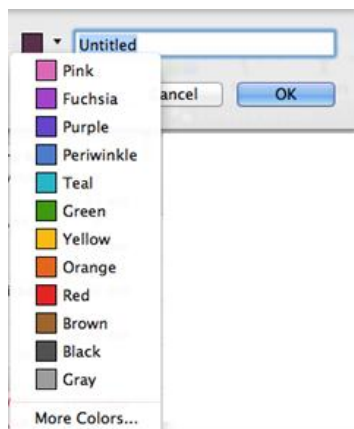3. Select the Category color from the menu and type a name for the Category.

4. Click **OK**.

   You are now ready to Apply the Category to the Outlook items you wish to export.

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Create Category from Calendar View

To add a Category from the Calendar view:

1. Click the **Organize** tab | **Categories**.

2. From the **Categories** window, at the bottom-left of the list, click the plus sign button, as shown at right.

3. Select the Category color from the menu.

4. Type a name for the Category | Click **OK**.

   You are now ready to Apply the Category to the Outlook items you wish to export.

Apply the Category

The second step in creating an Archive file is to apply the Category you created in the first step to the Outlook items you wish to export. This can be done from the main folder (Inbox, Contacts, Tasks, and Notes) view, from the Calendar, or from within the Outlook item.

Apply Category from Main Folder View

To apply the Category from the main folder (Inbox, Contacts, Tasks, and Notes) view:

1. Highlight the item to be exported | Click **Home** tab | **Categorize**, or right-click and select **Categorize**.

2. When the Category menu displays, click on the Category in the list to apply it.

   You are now ready to Export by Category.

Apply Category from Calendar

To apply the Category from the Calendar:

1. Highlight the item to be exported | Click **Organize Tab** | **Categories**.

2. When the Category window displays, click on the Category in the list to apply it.

   You are now ready to Export by Category.

Apply Category from within Outlook Item

To apply the Category from within the Outlook item:

1. Click **Categories**.

2. When the Category menu displays, click on the Category in the list to apply it.

   You are now ready to <u>Export by Category</u>.

Export by Category

The third step is to export a Category.

1. Click **File** | **Export**, as shown at right.

2. When the first **Export** window displays, for the **What do you want to export?** option, click to select **Outlook for Mac Data File (.olm)**.
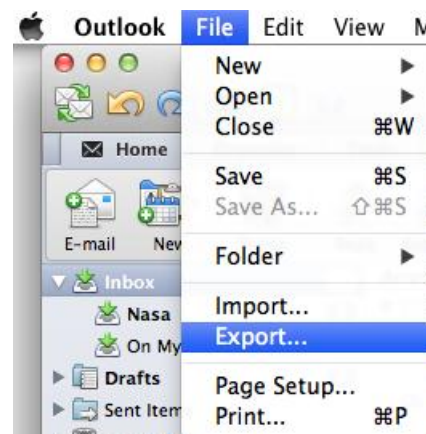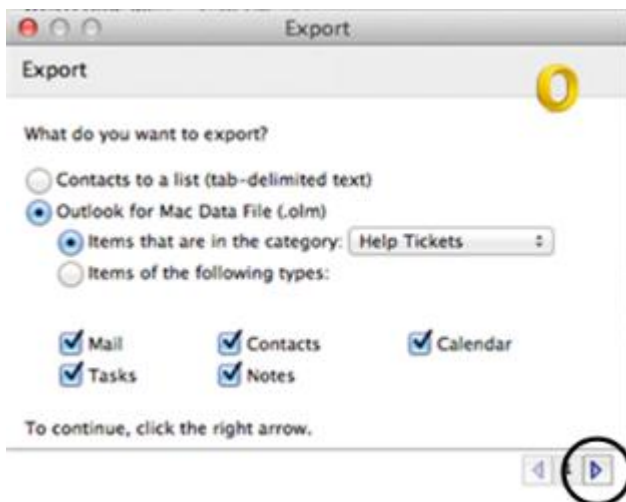
3. For the available Category list, click to select **Items that are in the category**.

4. From the menu, click to select the **Archive** category used to identify the items to be archived.

5. Ensure the correct Outlook main folders are selected that have items to be exported. Click to enable/disable **Mail, Contacts, Calendar, Tasks** and/or **Notes**.

   The more folders the Export has to search, the longer the Export will take.

6. In the bottom-right corner, click the right Arrow ▶ to continue.

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7. When the second **Export** window displays asking if you want to delete items from Outlook after they are exported, click to select one of the following:

   - No, do not delete items to make a copy of the exported items in a separate *.olm file.
   - Yes, delete items after they are exported to export and remove the exported items in one step.

Ensure the checkbox is enabled for **If exporting a category, do not delete items also belonging to another category**. This ensures any item with the archive category that also has another category applied will be skipped in the export process.

8. In the bottom-right corner, click the right Arrow to continue.

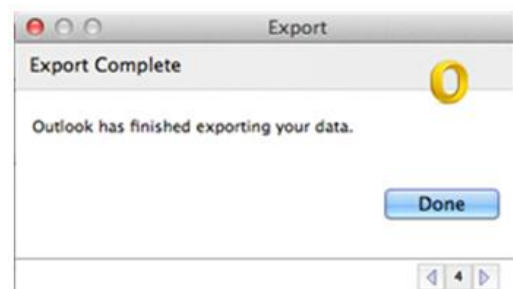9. When the **Save** window displays, select the storage location from the **Where** menu.

10. Click **Save**.

    Outlook begins exporting your data.
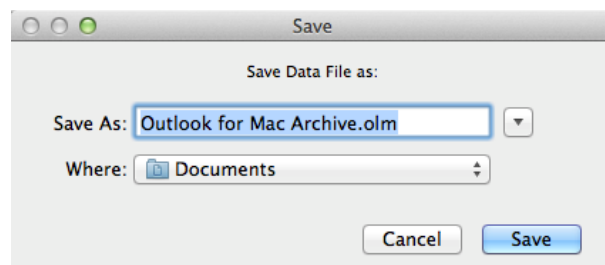
11. When the **Export Complete** screen displays, click **Done**.

    You are now ready to Import the .olm file back into Outlook.

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Import *.olm File into Outlook

The last step in creating your Archive file is to import the .olm file back into Outlook. These are also the steps to follow if you want to import Outlook data from one Macintosh to another, you can do this by importing the *.olm File.

1. Click **File** | **Import**, as shown at right.

2. When the **Begin Import** window displays, at the prompt **What do you want to import,** click to select **Outlook Data File**.
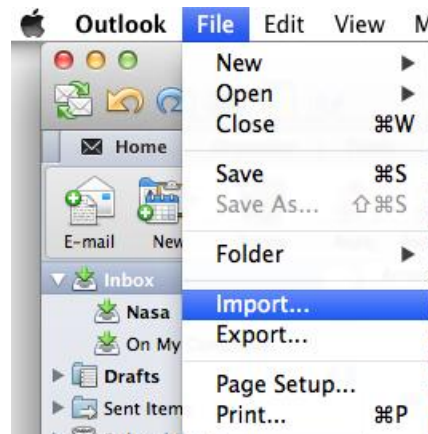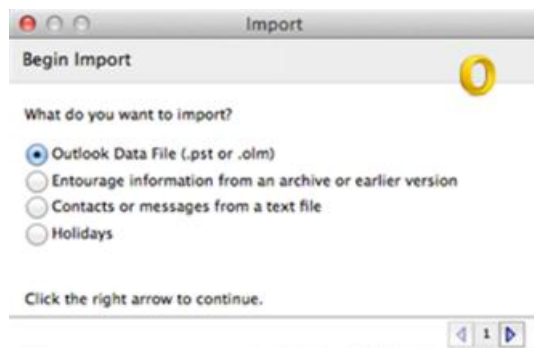
3. In the bottom right corner, click the right Arrow to continue.

4. When the **Choose a File Type** window displays, click to select **Outlook for Mac Data File (.olm)**.

5. In the bottom right corner, click the right Arrow to continue.
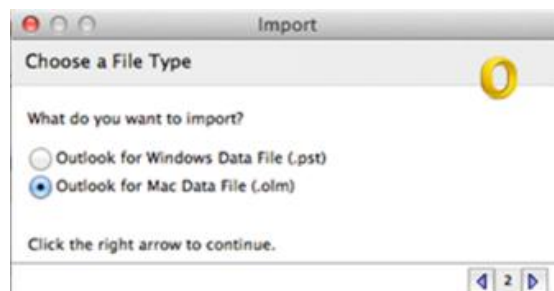
6. When the **Import** window displays, browse to the file you want to import | Click to highlight the file and click **Import**.

   Outlook begins importing your data.

7. When the **Import Complete** screen displays, click **Done**.

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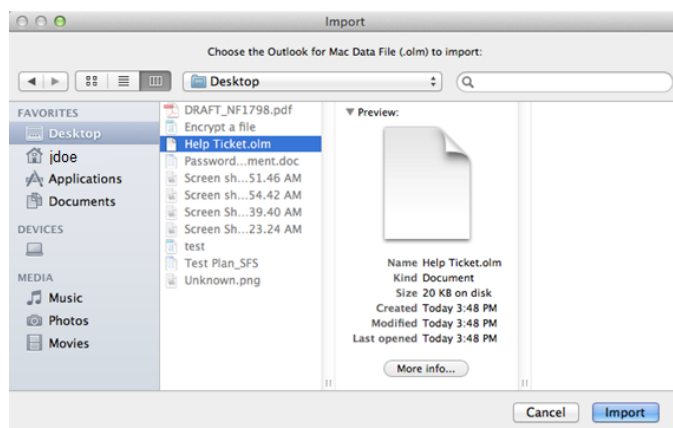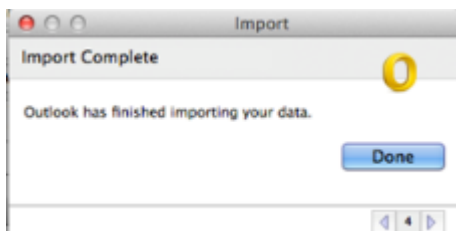
Your Archive folder now appears in Outlook in the **On My Computer** section of the Navigation Pane. However, your Outlook items are now outside of the Outlook Exchange server and outside of the **On My Computer** folders, thereby decreasing the size of your Outlook Exchange mailbox.

8. Repeat the Archive folder creation process until you have enough Categories for all your data.

   You are now ready to Move Outlook Data into Archive Files.

Move Outlook Data into Archive Files

The process of moving Outlook data into Archive folders is a continuous one. In the course of your day, as you work in Outlook, you can move previously viewed e-mails into the Archive folders you created. There are various methods for moving data into your newly created Archive folders:

- Select the item you wish to store in an Archive folder, such as an e-mail, and drag it into the specific Archive folder (shown right).

- To move an e-mail message while it is still open, right-click on the item | Select **Move** | **Choose Folder** | In the text box at the top, enter the name of the desired folder | When it appears, select it and click **Move**.

- Create rules to move items automatically. For more information, documentation on Rules and Filters is available at http://nomadinternal.nasa.gov/nomad/documentation.html.
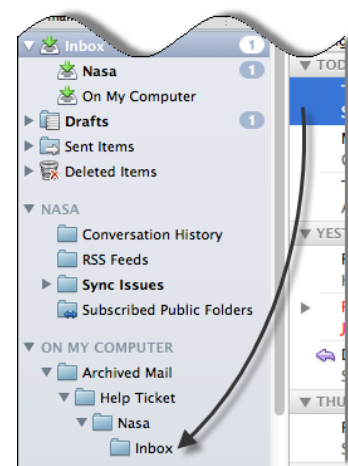
Check *.olm File Size

As very large .olm files can become corrupt, and .olm files over 20 GB will not be backed up, you may want to monitor the size. To check the size of your .olm file:

1. Go to the location where you exported your .olm file (See Export by Category).

2. Right-click and select **Get Info** (**Command-I**).

3. When the .olm Info window appears, look at the number next to **Size:** and reference the chart below to ensure it is less than 20 GB.

Data Measurement Chart	
1 Bit	1/8 of a Byte
1 Byte	8 Bits
1 Kilobyte (KB)	1000 Bytes
1 Megabyte (MB)	1,000,000 Bytes
1 Gigabyte (GB)	1,000,000,000 Bytes
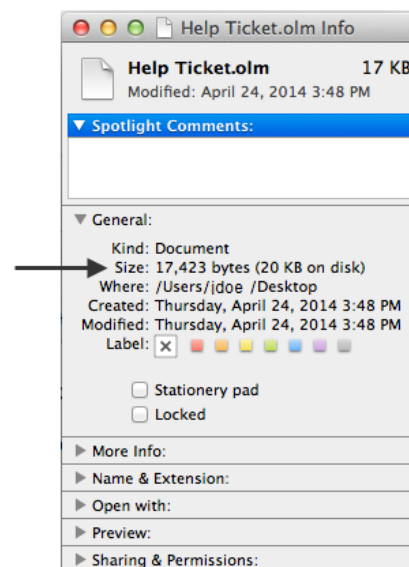
For assistance, contact the Enterprise Service Desk (ESD): Submit a ticket online at esd.nasa.gov, or call 358-HELP (4357) or 1-866-4NASAHQ (462-7247).

This document is posted on the ITCD Web site at:
http://itcd.hq.nasa.gov/instructions.html

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